Executive Summary

March 2011

Newport News Executive Summary

Following an RFP process, Buxton was selected to enter into a process of assisting the City of Newport News, VA to develop a comprehensive market analysis of the City to include the potential opportunities for retail expansion, and analysis of the impact of New Movers to the market.

As background, since 1994 Buxton has been assisting business leaders make informed decisions based on Best of Class Analytics. In 2002 these lessons learned from working with the most prestigious private sector firms in America were adopted to meet the growing needs of municipal leaders to have access to this same level of intelligence. Since, Buxton has worked with more than 500 municipalities in 42 states to assist them in understanding the changing needs and demands of their residents. Buxton is primarily known for the assistance provided to communities seeking to enhance their retail shopping environments, but has also assisted communities in the areas of library optimization, parks & recreation planning, new mover impacts, BRAC analysis, emergency services planning, and other key areas where access to household level data provides significant insights to the changing populations of the municipality.

At its core Buxton holds the largest repository of household level information in the United States. Access to this level of detail allows our clients (public and private) to make informed business decisions in areas that affect their customers, residents, patients, or users. Buxton maintains more than 250 individual databases and has built the methodologies and processes to mine the most comprehensive set of household level data available. Buxton's municipal clients have utilized this powerful information to develop retail strategies that have resulted in the recruitment of more than 35 million square feet of retail space, resulting in more than $5 billion in annual sales taking place in markets where it was not occurring prior to the engagement of Buxton.

A project plan was presented that would include:

- The ramifications of the changing economic development landscape,
- The opportunities for local retailers to capture market share of the demand of residents in the market
- Identification of regional and national retailers that would fit the demands of the residents in the market
- The changes taking place with BRAC and how the market changes over time.
- Implementation plans for marketing the opportunities to the respective communities.

Denbigh Boulevard and Warwick Boulevard

Through discussion with elected officials and staff at the City of Newport News, along with the best-in-class data in the Buxton repository, Buxton has examined the retail potential of the Denbigh and Warwick Boulevard corridor based on the following analyses:

- A primary drive-time trade area was delineated for the site
- The customers in the trade area were segmented according to buying habits and lifestyles
- A profile of Newport News' customers within the trade area was developed
- The surplus and leakage for 11 major store types and 49 minor store types were determined for the trade area
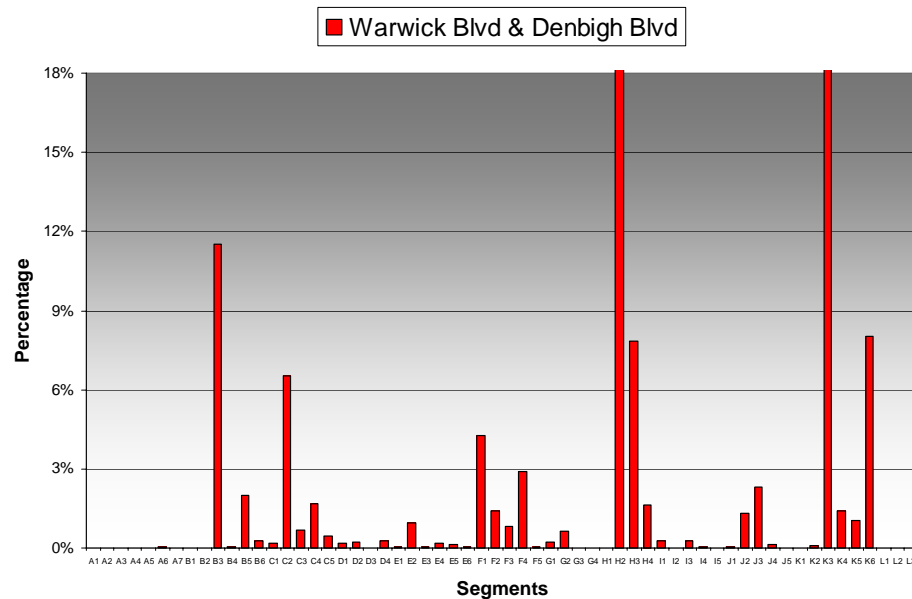
Newport News, Virginia: Trade Area

Denbigh Boulevard and Warwick Boulevard

For the site, Buxton then undertook and completed an exhaustive analysis of the customers in the trade area, the traffic of the market, and the associated retail demand.

Trade Potential Variables	Site 1 (5min)
Estimated Household Count	16,375
Number of Households in Dominant Segments	12,771
Traffic Count	52,450
Total Retail Demand	$2,494,783,470
Total Retail Supply	$3,030,309,185
Leakage/Surplus	$535,525,715

Each of these consumer types were then reported with a description of their lifestyle and behavioral characteristics. This information is reported in a complete profile documents that includes consumer behaviors, attitudinal information, employment characteristics, and other details to be used in an understanding of how they affect the overall market at a household level.

Denbigh Boulevard and Warwick Boulevard

Leakage Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis"
and can aid in the following:

-Indicating how well the retail needs of local residents are being met
-Uncovering unmet demand and possible opportunities
-Understanding the strengths and weaknesses of the local retail sector
-Measuring the difference between actual and potential retail sales

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0.

Source: Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data

Retail Site Analysis

Through this process, further analysis was completed to include the consumer propensities of the market, along with a list of the national and regional retail concepts that fit the area, but have yet made location decisions for expansion.

Retail Opportunities

Over 330 unique retail concepts were identified as opportunities for recruitment to the trade area. These retailers included a number of retailers who fit the overall landscape, but more importantly, increase the value of the area as it relates to real estate value, increasing sales revenue for the trade area, and most importantly, enhance the quality of life of the residents in the market. All of this is accomplished with the ability to demonstrate to the associated corporate site selectors that Newport News fits their business needs, and will provide long-term viability for their success.

As a sample, these matches included:

A&W Drive-In	Everything But Water
AMC Theaters	Golden Corral Steakhouse
BJ's Wholesale Club	Hibbett Sporting Goods
Carmike Cinema	Jason's Deli
Carvel	Red Wing Shoe Store
Catherine's Stores	Simply Fashions
Cato	Sonic Drive In Restaurant
Cici's Pizza	Sports Authority
Cinemark Theater	Gymboree P and M
Costco Wholesale	Pearle Vision
Dave & Busters	Fashion Trends
Denny's Restaurant	

Additional matches have been included in the SCOUT system for use by City staff as they begin the recruitment process.

Retail Site Analysis
Consumer Propensity Report (CPR)

A critical component of any retail expansion plan is to understand the merchandising opportunities for existing retailers. To facilitate this process, Buxton undertook a Consumer Propensity Analysis of merchandising opportunities. This information is intended to identify underserved opportunities by product for those existing retailers.

The Consumer Propensity Report (CPR) shows the lifestyle, product, and psychographic likelihood indices for the consumers within the trade area being analyzed. Major retail, restaurant, grocery, and consumer packaged goods firms use this very same information to drive marketing and merchandising decisions.

Each analyzed item is assigned a propensity index score with 100 being average. For example, if the consumers within a trade score a 120 for a given analysis item you know that those consumers are 20% more likely to participate in or purchase that item than the average American household to participate in or purchase that item.

Information is provided for 32 major categories with over 4,800 total line items. Please note that line items are based upon national-level purchasing and lifestyle characteristics. These line items are then correlated to the underlying household characteristics of the consumers within the trade area being analyzed. Some line items may not be necessarily relevant or available currently in your market or region. The index score in these situations serves to indicate the degree to which the consumers would participate in or purchase that item if it were relevant and available. Often this is taken as an opportunity for expansion of a similar brand or concept within the category.

CPR Categories

Apparel	Food: Baking	Home Improvement
Automotive	Food: Condiments	Household Products
Beverages: Alcoholic	Food: Dairy	Lawn and Garden
Beverages: Non-alcoholic	Food: Frozen	Lifestyle Statements
Cable/TV/Radio	Food: General	Medicines/Drugs/Ailments
Cleaning Products	Food: Meat	Pets and Pet Food
Computer/Internet	Food: Snack/Dessert	Print Media
Dining	Health and Beauty	Shopping
Electronics	Hispanic Spanish Media	Telecom
Entertainment/Leisure	Hispanic Demographics	Tobacco
Financial Services	Home Furnishings/Appliances	

Retail Site Analysis
Consumer Propensity Report (CPR)

CATEGORY	VARIABLE NAME	Site 1 (5min Trade Area)
APPAREL	SPEND $150+ ON OTHER SHOES KID LESS THAN 1 YEAR	124
APPAREL	USE DRYPERS BRAND DISP DIAPERS/TRAIN PANTS	161
APPAREL	USE HUGGIES LITTLE SWIMMERS DISP DIAPERS/TRAIN PANTS	99
APPAREL	USE HUGGIES PULL-UPS DISP DIAPERS/TRAIN PANTS	107
APPAREL	USE HUGGIES ULTRA TRIM DISP DIAPERS/TRAIN PANTS	108
APPAREL	USE STORE BRANDS DISP DIAPERS/TRAIN PANTS	110
APPAREL	USE OTHER BRANDS DISP DIAPERS/TRAIN PANTS	100
APPAREL	USE HUGGIES OVERNITES DISP DIAPERS/TRAIN PANTS	157
APPAREL	USE HUGGIES SUPREME DISP DIAPERS/TRAIN PANTS	116
APPAREL	USE PAMPERS BABY DRY DISP DIAPERS/TRAIN PANTS	119
APPAREL	USE PAMPERS CRUISERS DISP DIAPERS/TRAIN PANTS	109
APPAREL	USE LUVS ULTRA LEAK GUARDS DISP DIAPERS/TRAIN PANTS	106
APPAREL	BOUGHT MENS JEANS WITHIN LAST 12 MONTHS	89
APPAREL	BOUGHT MENS ATHLETIC SHOES WITHIN LAST 12 MONTHS	93
APPAREL	BOUGHT MENS OVERCOAT/TOPCOAT WITHIN LAST 12 MONTHS	118
APPAREL	BOUGHT MENS LEATHER JACKET WITHIN LAST 12 MONTHS	116
APPAREL	BOUGHT MENS RAINCOAT OR ALL-WEATHER COAT WITHIN LAST 12 MONTHS	96
APPAREL	BOUGHT MENS SPORT COAT OR BLAZER WITHIN LAST 12 MONTHS	84
APPAREL	BOUGHT MENS SWEATER WITHIN LAST 12 MONTHS	93
APPAREL	BOUGHT MENS NECKTIE WITHIN LAST 12 MONTHS	105
APPAREL	BOUGHT MENS REGULAR OR DRESS SHIRT WITHIN LAST 12 MONTHS	89
APPAREL	BOUGHT MENS SPORT SHIRT (ALL TYPES)WITHIN LAST 12 MONTHS	86
APPAREL	BOUGHT MENS UNDERWEAR WITHIN LAST 12 MONTHS	91
APPAREL	BOUGHT MENS T-SHIRT (OUTERWEAR) WITHIN LAST 12 MONTHS	93
APPAREL	BOUGHT MENS OTHER GYM/JOGGING/WORKOUT CLOTHES WITHIN LAST 12 MONTHS	99
APPAREL	BOUGHT MENS UNDERWEAR WITHIN LAST 12 MONTHS	85
APPAREL	BOUGHT MENS SWIMSUIT WITHIN LAST 12 MONTHS	77
APPAREL	BOUGHT MENS SUIT WITHIN LAST 12 MONTHS	114
APPAREL	BOUGHT MENS SLACKS/PANTS (NOT JEANS) WITHIN LAST 12 MONTHS	90
APPAREL	BOUGHT MENS OTHER SHOES WITHIN LAST 12 MONTHS	92
APPAREL	BOUGHT MENS BOOTS (EXCLUDING WORK BOOTS) WITHIN LAST 12 MONTHS	104
APPAREL	BOUGHT WOMENS JEANS WITHIN PAST 12 MONTHS	99
APPAREL	BOUGHT WOMENS ATHLETIC SHOES WITHIN PAST 12 MONTHS	94
APPAREL	BOUGHT WOMENS BOOTS (EXCLUDING WORK BOOTS) WITHIN PAST 12 MONTHS	112
APPAREL	BOUGHT WOMENS SUIT WITHIN PAST 12 MONTHS	149
APPAREL	BOUGHT WOMENS OTHER SHOES WITHIN PAST 12 MONTHS	96
APPAREL	BOUGHT WOMENS OVERCOAT/JACKET WITHIN PAST 12 MONTHS	105
APPAREL	BOUGHT WOMENS DRESS WITHIN PAST 12 MONTHS	112

Additional detailed reporting of this information is posted to the City's SCOUT system for use in addressing these specific needs.

Marketing

Marketing a community is complex and challenging. It requires hours and hours of mundane tasks like research, target selection and preparation of marketing materials. A great deal of time and resources are consumed in the process before pitching a prospect.

Retail development involves these key players that you may interact with:

- Retailer
- Developers
- Existing business
- Brokers
- Business Development Groups

Recruitment

Retail Specific Marketing Package

For each target retailer, Community*ID* provided a specific retail marketing package that is tailored to address the location issues that are important to the prospect and sets forth the research results illustrating to the retailer the opportunities for a successful store at your location. This package is designed as a sales presentation and arms you with the details needed to make a convincing pitch.

International Council of Shopping Centers (ICSC)

The annual ICSC spring convention in Las Vegas brings together retail and restaurant concepts of all types and sizes. Executives from most major companies attend. While not all have booths, **they are there to talk about where to locate their next store, restaurant or development.**

Buxton recommends the City:

1) Remain active with ICSC.
2) Register to attend the convention.
3) Obtain list of the attendees, not just the exhibitors, from ICSC.
4) Screen list for retailers and restaurants that have been identified by the Community*ID* process.
5) Before the show, contact target companies and make appointments to meet at the show.
6) Arrive prepared with the information needed to successfully market your community.
    i.e.: business card, site plans, community profiles and conceptual design programs
7) Come with a follow up plan. The goal of the meeting is to establish a rapport and get a second appointment.

Post-Presentation

1. **Long-sale Cycles**
   Generally, retailers do not make a high-stakes location decision on the basis of one visit. Success requires building and maintaining relationships for the long haul.

2. **Follow Up**

   Community marketers are often frustrated with "no action" after the initial presentation. The momentum of the decision process is difficult to maintain, but it is up to you to keep it going. Hoping and coping is not an option. Gain control by frequent contact and follow up.

In Summary

The City should immediately begin planning to attend ReCon and schedule meetings with the following:
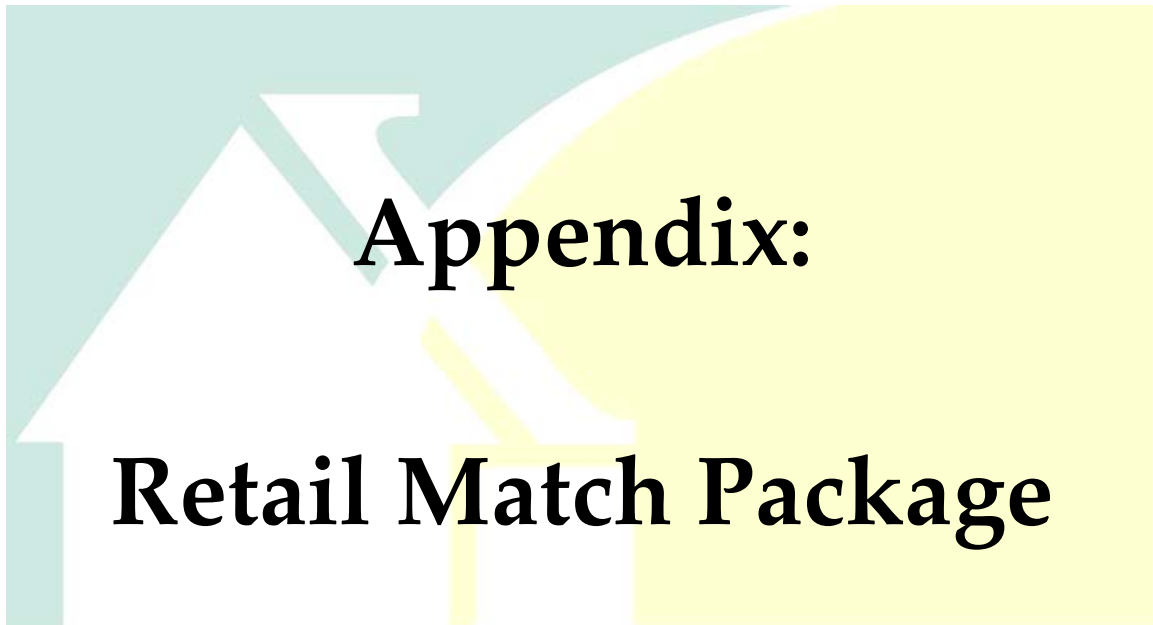
- Identified Retailers
- Developers working in the market
- Existing retailers to discuss needs for remaining viable and healthy in Newport News

For each of these meetings, City staff should prepare specific materials (from the Buxton deliverables) that will provide compelling intelligence as to the ongoing, and/or emerging, opportunities presented in the Denbigh Boulevard & Warwick Boulevard community.

The City should also immediately engage local and existing retailers with the information developed through this process and assist them in understanding:

- Merchandising opportunities
- In-depth knowledge of the clients in the Trade Area
- Marketing insight gained from the Mosaic Profiles available through SCOUT
- An understanding of the GAPS in retail demand and inventory from the reporting available through SCOUT

Appendix:

Retail Match Package

Newport News, VA

As a Location For

JASON'S DELI

Buxton®
IDentifying Customers®

Table of Contents

Retail Snapshot

Retail Trade Area & Site Characteristics

Retail Trade Area	15-minute drive time
Site Traffic Count (average daily volume)	45,752

Key Trade Area Demographics (15-minute drive time)

Total Population (2008)	187,097
Total Households (2008)	76,088
Population Growth ('00 – '08)	1.4%
Projected Pop. Growth ('08 – '13)	0.7%
Household Growth ('00 – '08)	8.4%
Total Workplace Population (2008)	83.411
Average Household Income (2008)	$67,192

Retail Potential

Highest Leakage Index by Store Type

Food & Beverage Stores	-$43,656,604
Miscellaneous Store Retailers	-$6,494,948
Building Material & Garden Equipment & Supply Dealers	-$718,066

Executive Summary

Purpose of This Report

On behalf of Newport News, VA, Buxton conducted a study to determine the viability of Newport News as a location for JASON'S DELI. Buxton, based in Fort Worth, Texas, is a leading retail site location firm with clients including The Container Store, FedEx Office, California Pizza Kitchen, PETCO and hundreds of other national retailers and restaurants.

This report is intended to demonstrate the viability of Newport News as a location for consideration by JASON'S DELI. Further, it is meant to serve as a foundation for discussion between representatives of Newport News and JASON'S DELI.

Determination of Newport News' Potential as a Location for JASON'S DELI

Buxton identified a number of JASON'S DELI locations in markets that are similar to Newport News. We analyzed the demographic and psychographic characteristics of households in those markets where JASON'S DELI currently has locations. We compared the results with characteristics of households comprising Newport News' retail trade area in order to determine if Newport News is a good "match" for JASON'S DELI.

This report encapsulates the results of our analysis and documents the potential for JASON'S DELI to establish a successful location in Newport News.

The following are some reasons JASON'S DELI should consider Newport News as a potential location:

- The potential site possesses large numbers of households with a mix of dominant segment households that appeal to a wide variety of retailers and restaurants

- The large amount of retail spending surplus within the trade area is indicative of the regional draw of the Newport News market.

Overall, this Newport News, VA site is well situated to attract a quality mix of desired retailers and restaurants.

This is an excellent opportunity for JASON'S DELI to achieve its expansion goals.

Retail Matching Methodology

Newport News' Site Trade Area Profile

Newport News' site trade area profile is created by analyzing the household segmentation (lifestyles and behavior patterns) of the residents within the trade area. The site's trade area profile is what distinguishes it from other areas in the community. The household profile of a trade area provides retailers/restaurants with the necessary information for screening potential locations for the placement of new stores/restaurants.

JASON'S DELI Trade Area Profile

The trade area profile for JASON'S DELI is created by analyzing their existing locations in markets that are similar to Newport News. Drive time trade areas are generated around all existing JASON'S DELI locations in similar markets to Newport News. A household profile is computed for each of these locations, forming an overall average trade area profile for JASON'S DELI.

Profile Matching

Buxton uses a proprietary profile matching algorithm to determine if JASON'S DELI should be considered a "match" for the site trade area. By analyzing the household segmentation (psychographics), demographics, and the existing retail landscape, Buxton is able to recommend if JASON'S DELI "matches" the site trade area.
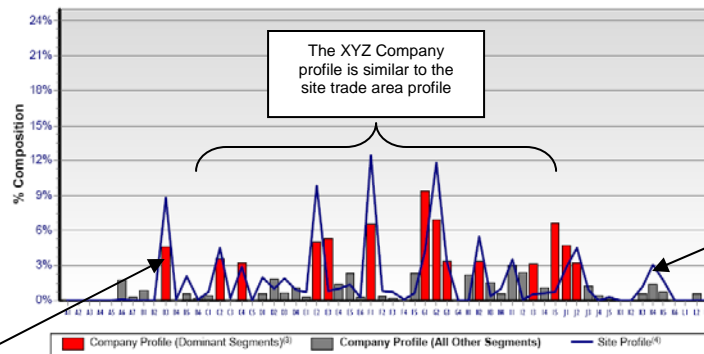
The following page highlights several of the key elements when determining a match.

Retail Matching Methodology (continued)

The two example match reports below illustrate a "match" and a "non-match."

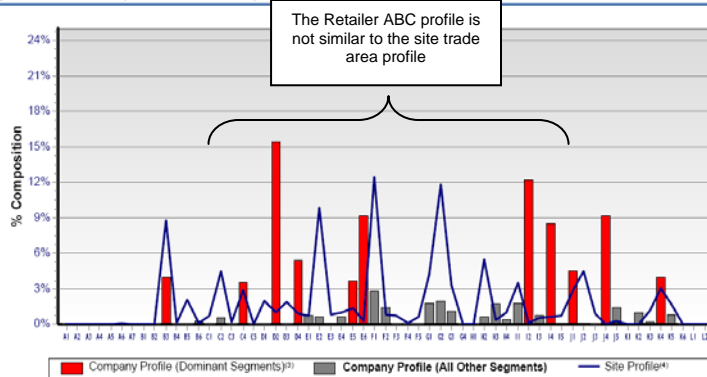### Match

Segmentation Profile[1] (10 Minute Drive Time)[2]

The XYZ Company profile is similar to the site trade area profile

Line graph represents the site trade area profile

Bar graph represents the retailer's average trade area profile

Company Profile (Dominant Segments)[3]   Company Profile (All Other Segments)   Site Profile[4]

Trade Area Comparison (10 Minute Drive Time)

	XYZ Company Average Trade Area[5]	Your Community, USA Site Trade Area
Total Population	75,996	74,212
Total Households	27,050	26,584
Company Dominant Segment Households	21,790	22,717

There is a greater number of XYZ Company's dominant segment households in the site trade area than the average Retailer ABC retail trade area

Non Match

Segmentation Profile[1] (10 Minute Drive Time)[2]

The Retailer ABC profile is not similar to the site trade area profile

Company Profile (Dominant Segments)[3]   Company Profile (All Other Segments)   Site Profile[4]

Trade Area Comparison (10 Minute Drive Time)

	Retailer ABC Average Trade Area[5]	Your Community, USA Site Trade Area
Total Population	81,846	74,212
Total Households	28,082	26,584
Company Dominant Segment Households	22,024	4,717

There are much fewer Retailer ABC dominant segment households in the site trade area than the average Retailer ABC retail trade area
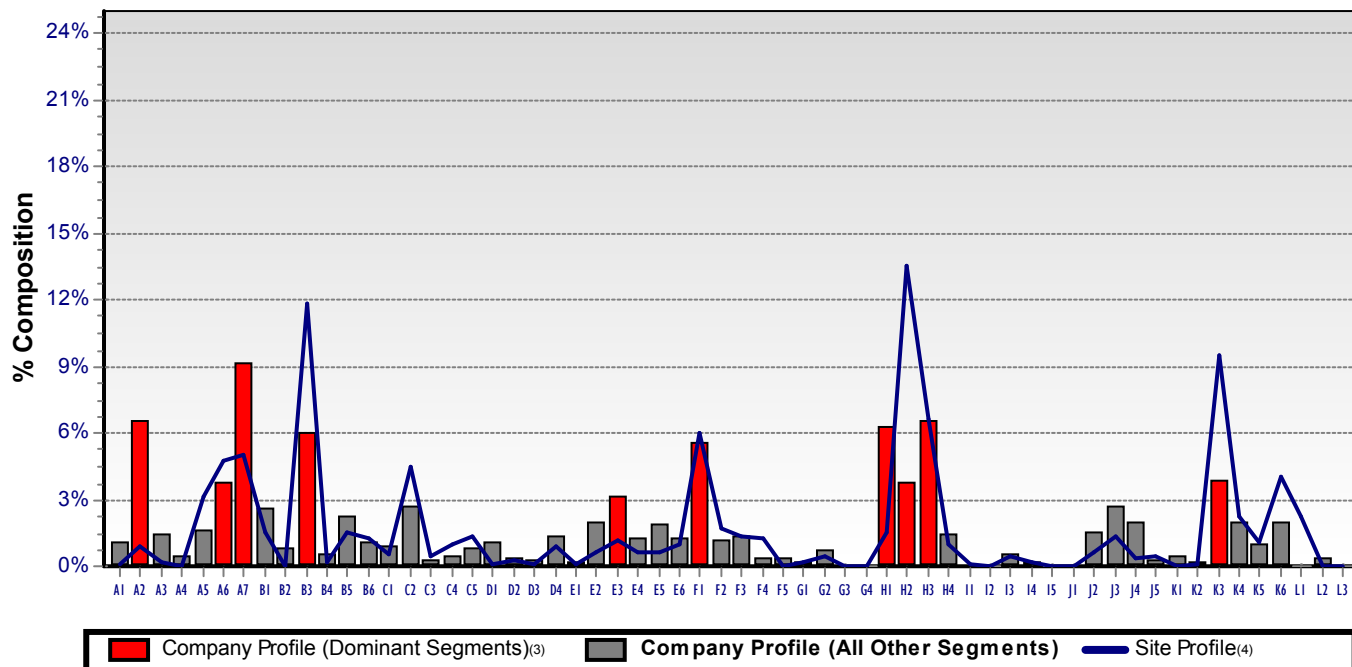
CommunityID®

Profile Match Report

Company: JASON'S DELI	Site: WARWICK BLVD & DENBIGH BLVD
Report Date: 7/16/2010	Newport News, VA

Segmentation Profile[1] (15 Minute Drive Time)[2]

Legend: Company Profile (Dominant Segments)[3] ■ | Company Profile (All Other Segments) ■ | Site Profile[4] ——

Trade Area Comparison (15 Minute Drive Time)

	JASON'S DELI Average Trade Area[5]	Newport News, VA Site Trade Area
Total Population	181,183	187,097
Total Households	69,307	76,088
Company Dominant Segment Households	37,906	46,331

[1]	**Segmentation Profile**	Every U.S. household is classified into one of 60 distinct segments described by that household's lifestyle and spending habits.
[2]	**Drive Time**	Drive time is used to define the trade area.
[3]	**Dominant Segments**	Any segment that makes up at least 3 percent of a retailer's targeted profile **(RED BARS)**.
[4]	**Site Profile**	Those segments within the site's drive time trade area **(BLUE LINE)**.
[5]	**Average Trade Area**	JASON'S DELI trade areas used in this comparison are similar in population and market type to Newport News, VA.

N

Chesapeake Bay

238

Yorktown

64

105

173

60

17

PATRICK HENRY MALL

171

134

172

Newport News

143

THE POWER PLANT
OF HAMPTON ROADS

James River

GIS

NEWPORT NEWS, VA

CORPORATION OF NEWPORT NEWS VIRGINIA

CommunityID

Shopping Centers

GLA in thousands

● 1000+

● 500 to 1000
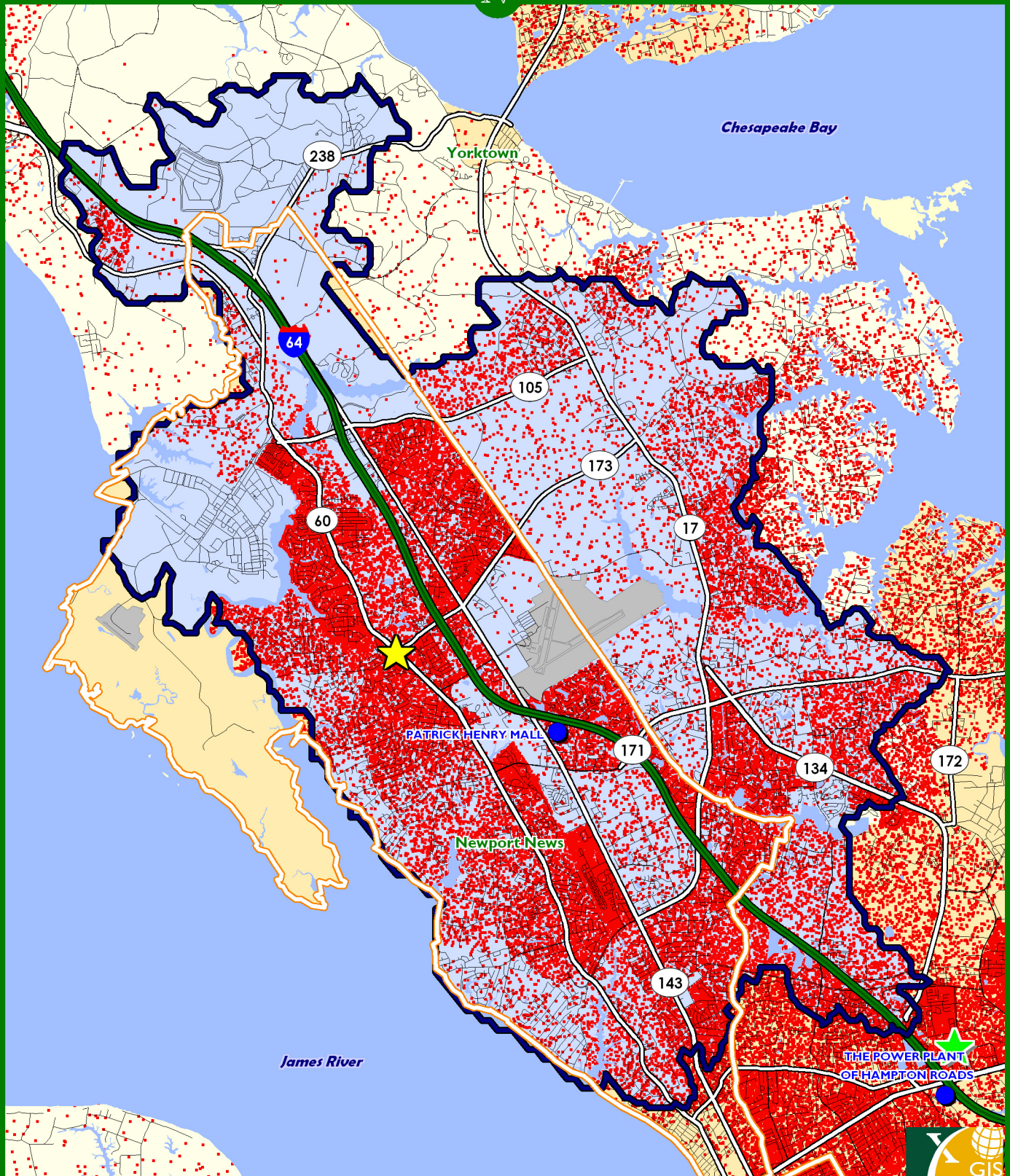
★ **Proposed
Retail Location**

☐ **Trade Area**

★ **JASON'S DELI**

Dominant Segment Households

▦ I Dot = I Household

Miles

0   1   2

N

17

Chesapeake Bay

238

Yorktown

105

60

173

64

17

134

172

PATRICK HENRY MALL

Newport News

143

James River

152

THE POWER PLANT
OF HAMPTON ROADS

GIS

NEWPORT NEWS, VA: Population Map

CORPORATION OF NEWPORT NEWS VIRGINIA

CommunityID

Shopping Centers

GLA in thousands

● 1000+

● 500 to 1000
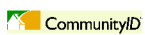
☆ **Proposed**
Retail Location

☐ **Trade Area**

2008 Population
By Block Group

■ 5,000 and Above
■ 3,000 to 5,000
■ 1,500 to 3,000
■ 1,000 to 1,500
□ 1,000 and Below

Miles

0   1   2

N

17

238

Chesapeake Bay

Yorktown

105

60

173

64

17

PATRICK HENRY MALL

134

172

Newport News

143

152

James River

THE POWER PLANT
OF HAMPTON ROADS
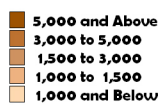
GIS
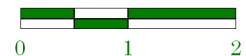
NEWPORT NEWS, VA: Median Income

Shopping Centers

GLA in thousands

● 1000+

● 500 to 1000
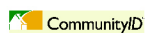
Proposed
Retail Location

☐ Trade Area

**Median Household Income
By Block Group**

■ $200,000 and Above
■ $100,000 to $200,000
■ $50,000 to $100,000
■ $25,000 to $50,000
■ $25,000 and Below

Miles

0   1   2

CommunityID

N

20,866
20,866
4,462
64
2,800
5,895
1,929
6,180
1,100
9,228
5,547
5,130
9,032
90
5,880
9,382
1,800
3,393
24,996
173
3,959
2,833
16,506
2,426
13,762
2,460
13,762
5,664
5,412
2,857
3,696
11,521
2,223
17,500
3,486
3,007
38,000
29,531
2,863
22,876
2,342
29,531
22,876
1,969
41,000
9,906
512
18,000
8,454
2,996
4,400
19,974
3,480
10,130
19,974
45,000
143
160
4,777
32,735
4,954
13,205
13,205
6,035
7,800
5,612
21,419
7,424
21,419
5,500
4,700
2,000
3,416
3,276
60
6,088
13,931
Warwick River
10,865
5,130
16,678

GIS

NEWPORT NEWS, VA: Traffic

CORPORATION OF NEWPORT NEWS VIRGINIA

CommunityID

⭐ **Proposed Retail Location**

🚗 **Traffic Count**

Miles

0   0.5   1

Retail Leakage and Surplus Analysis

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

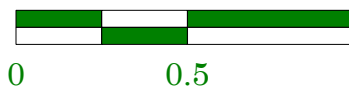-Indicating how well the retail needs of local residents are being met
-Uncovering unmet demand and possible opportunities
-Understanding the strengths and weaknesses of the local retail sector
-Measuring the difference between actual and potential retail sales

Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 1. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types
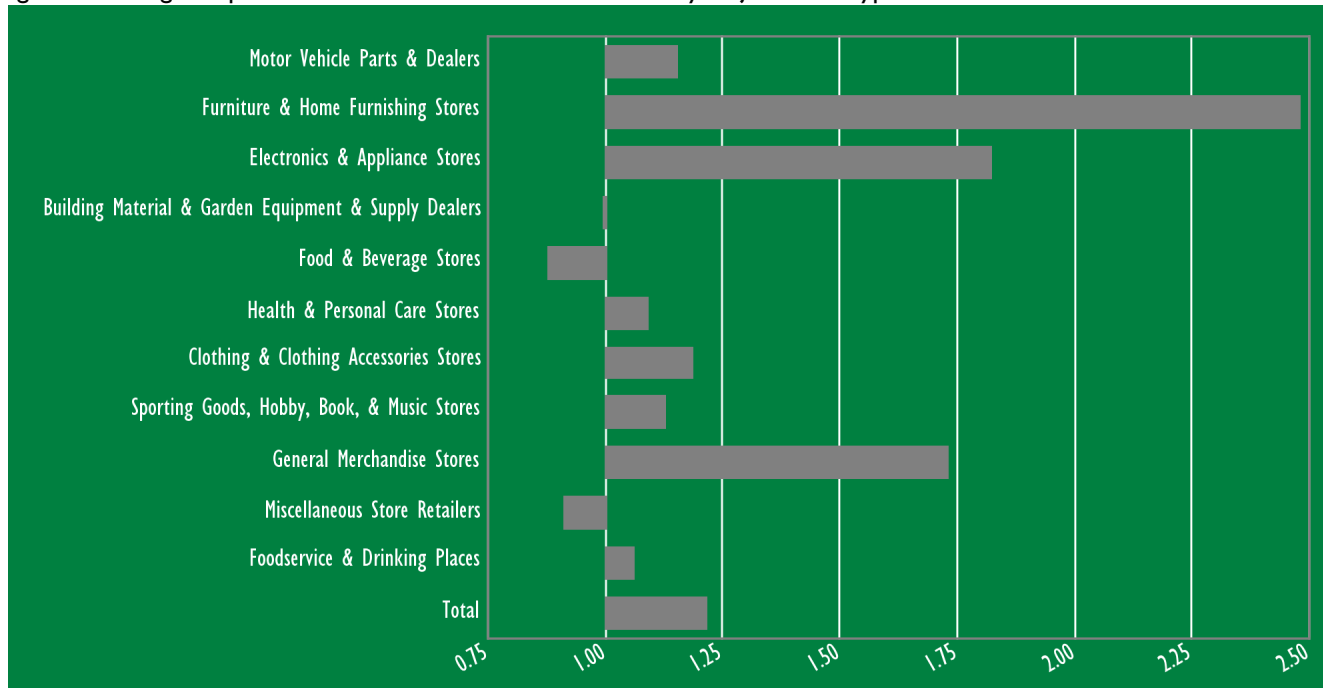
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	$583,004,217	$672,757,822	1.2
Furniture & Home Furnishing Stores	$74,494,801	$184,557,880	2.5
Electronics & Appliance Stores	$69,603,049	$126,686,701	1.8
Building Material & Garden Equipment & Supply Dealers	$312,867,620	$312,149,554	1.0
Food & Beverage Stores	$359,287,688	$315,631,084	0.9
Health & Personal Care Stores	$156,773,763	$170,705,243	1.1
Clothing & Clothing Accessories Stores	$144,608,452	$171,253,637	1.2
Sporting Goods, Hobby, Book, & Music Stores	$53,625,604	$60,443,775	1.1
General Merchandise Stores	$362,591,591	$627,021,497	1.7
Miscellaneous Store Retailers	$74,841,579	$68,346,631	0.9
Foodservice & Drinking Places	$303,085,106	$320,755,360	1.1
Total	$2,494,783,470	$3,030,309,185	1.2

Buxton®
iDentifying Customers

Sub-Categories of Motor Vehicle Parts & Dealers

Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	$502,353,259	$568,247,025	1.1
Expenditures at Other Motor Vehicle Dealers	$34,790,178	$52,142,364	1.5
Expenditures at Automotive Parts, Accessories, and Tire Stores	$45,860,781	$52,368,433	1.1
Total Motor Vehicle Parts & Dealers	$583,004,217	$672,757,822	1.2

Sub-Categories of Furniture & Home Furnishing Stores
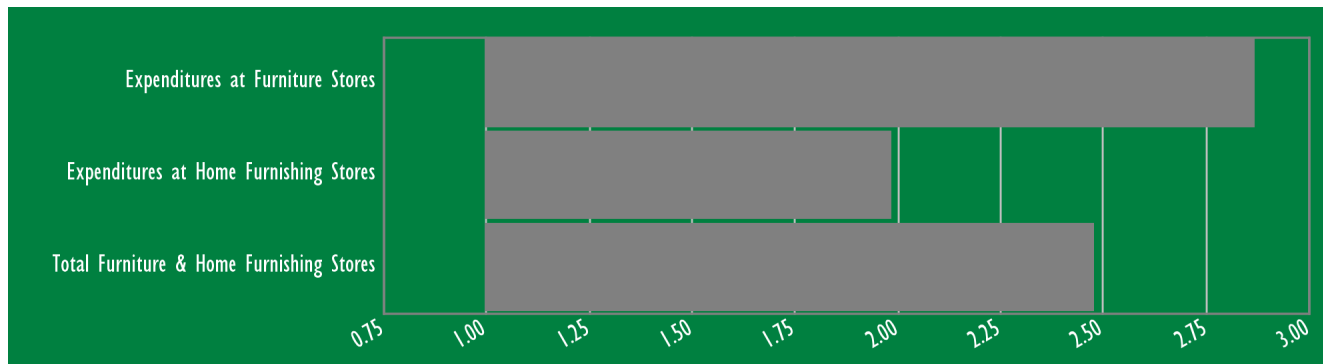
Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	$41,295,624	$118,526,062	2.9
Expenditures at Home Furnishing Stores	$33,199,177	$66,031,819	2.0
Total Furniture & Home Furnishing Stores	$74,494,801	$184,557,880	2.5

Buxton   Tel: 817.332.3681

2651 South Polaris Drive   Fax: 817.332.3686

Fort Worth, TX 76137   www.buxtonco.com

Buxton
iDentifying Customers

05/11/2010   4 of 14

Sub-Categories of Electronics & Appliance Stores
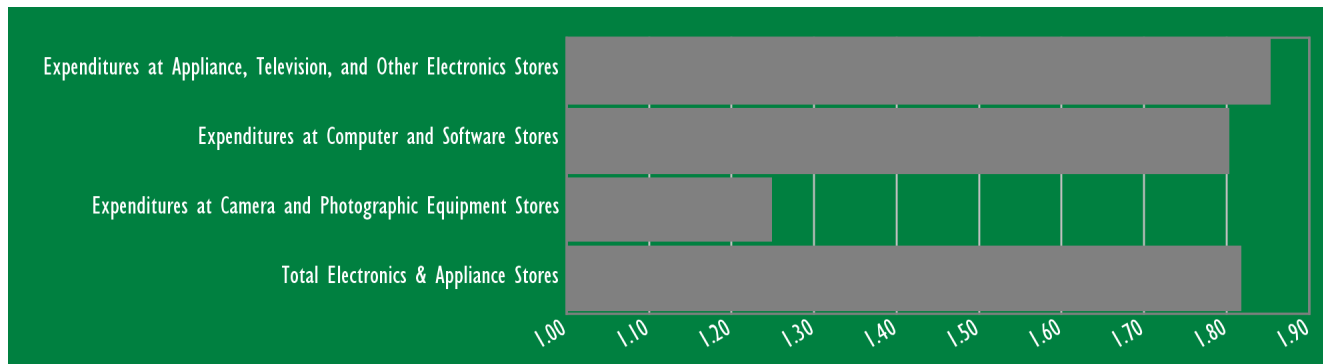
Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	$52,232,108	$96,898,000	1.9
Expenditures at Computer and Software Stores	$14,572,997	$26,289,982	1.8
Expenditures at Camera and Photographic Equipment Stores	$2,797,944	$3,498,719	1.3
Total Electronics & Appliance Stores	$69,603,049	$126,686,701	1.8

Buxton   Tel: 817.332.3681
2651 South Polaris Drive   Fax: 817.332.3686
Fort Worth, TX 76137   www.buxtonco.com

Buxton
iDentifying Customers

05/11/2010   5 of 14
Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Building Material & Garden Equipment & Supply Dealers

Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	$113,558,789	$129,761,979	1.1
Expenditures at Paint and Wallpaper Stores	$6,610,502	$9,615,732	1.5
Expenditures at Hardware Stores	$23,167,588	$27,086,724	1.2
Expenditures at Other Building Materials Dealers	$143,850,603	$117,722,939	0.8
Expenditures at Outdoor Power Equipment Stores	$3,861,089	$2,448,235	0.6
Expenditures at Nursery and Garden Centers	$21,819,048	$25,513,945	1.2
Total Building Material & Garden Equipment & Supply Dealers	$312,867,620	$312,149,554	1.0

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Food & Beverage Stores

Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	$310,017,509	$274,305,449	0.9
Expenditures at Convenience Stores	$16,224,502	$24,031,406	1.5
Expenditures at Specialty Food Stores	$10,332,757	$4,951,125	0.5
Expenditures at Beer, Wine, and Liquor Stores	$22,712,920	$12,343,105	0.5
Total Food & Beverage Stores	$359,287,688	$315,631,084	0.9

Buxton
2651 South Polaris Drive
Fort Worth, TX 76137

Tel: 817.332.3681
Fax: 817.332.3686
www.buxtonco.com

05/11/2010
7 of 14

Sub-Categories of Health & Personal Care Stores

Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	$136,614,302	$129,707,856	0.9
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	$5,425,852	$9,542,926	1.8
Expenditures at Optical Goods Stores	$5,078,537	$13,337,234	2.6
Expenditures at Other Health and Personal Care Stores	$9,655,072	$18,117,227	1.9
Total Health & Personal Care Stores	$156,773,763	$170,705,243	1.1

Buxton

2651 South Polaris Drive

Fort Worth, TX 76137

Tel: 817.332.3681

Fax: 817.332.3686

www.buxtonco.com

05/11/2010

8 of 14

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Clothing & Clothing Accessories Stores
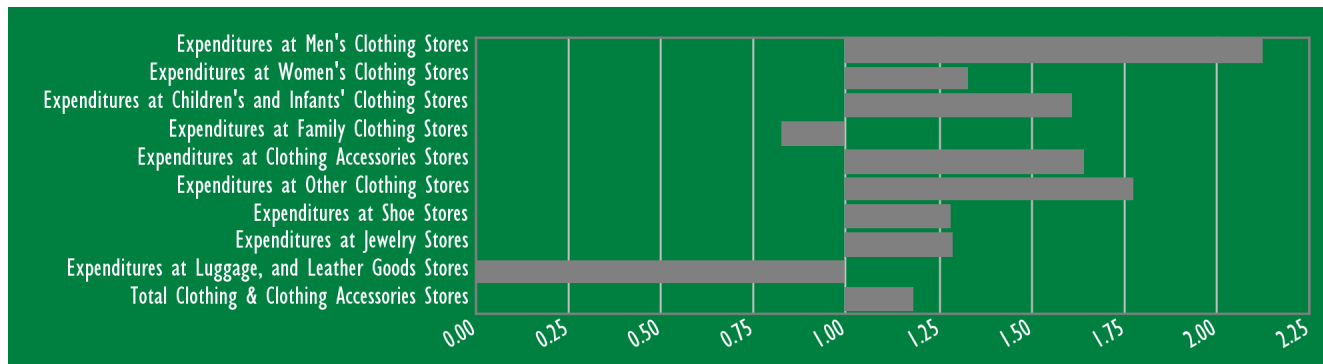
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	$6,681,115	$14,225,300	2.1
Expenditures at Women's Clothing Stores	$26,402,260	$35,132,748	1.3
Expenditures at Children's and Infants' Clothing Stores	$6,044,490	$9,735,249	1.6
Expenditures at Family Clothing Stores	$55,843,253	$46,275,242	0.8
Expenditures at Clothing Accessories Stores	$2,392,287	$3,936,780	1.6
Expenditures at Other Clothing Stores	$6,653,501	$11,835,576	1.8
Expenditures at Shoe Stores	$19,269,063	$24,695,207	1.3
Expenditures at Jewelry Stores	$19,676,779	$25,417,536	1.3
Expenditures at Luggage, and Leather Goods Stores	$1,645,704	$0	0.0
Total Clothing & Clothing Accessories Stores	$144,608,452	$171,253,637	1.2

Buxton
2651 South Polaris Drive
Fort Worth, TX 76137

Tel: 817.332.3681
Fax: 817.332.3686
www.buxtonco.com

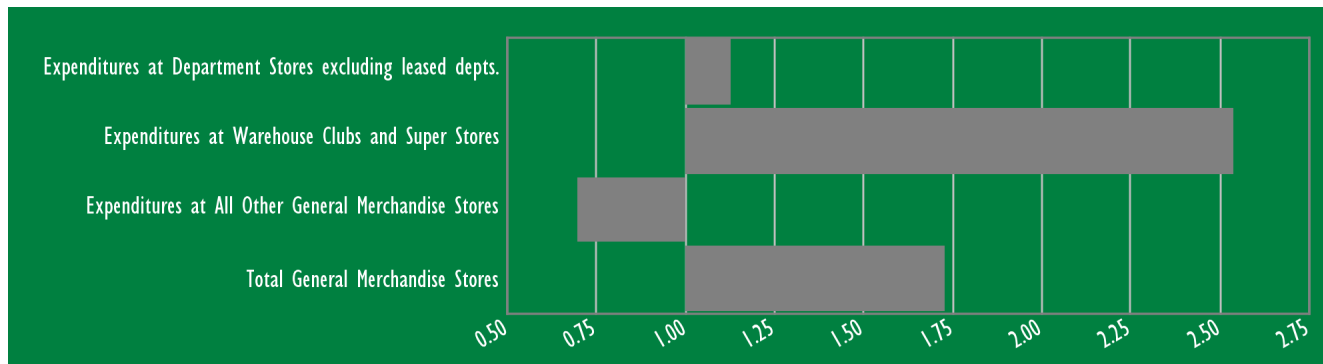05/11/2010   9 of 14

Sub-Categories of Sporting Goods, Hobby, Book, & Music Stores

Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	$18,698,705	$12,235,485	0.7
Expenditures at Hobby, Toys and Games Stores	$12,091,404	$21,326,033	1.8
Expenditures at Sew/Needlework/Piece Goods Stores	$2,862,383	$2,578,158	0.9
Expenditures at Musical Instrument and Supplies Stores	$3,491,372	$4,114,171	1.2
Expenditures at Book Stores and News Dealers	$11,437,454	$16,386,092	1.4
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	$5,044,285	$3,803,837	0.8
Total Sporting Goods, Hobby, Book, & Music Stores	$53,625,604	$60,443,775	1.1

Buxton   Tel: 817.332.3681
2651 South Polaris Drive   Fax: 817.332.3686
Fort Worth, TX 76137   www.buxtonco.com

Buxton
iDentifying Customers

05/11/2010   10 of 14
Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of General Merchandise Stores

Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	$174,173,519	$196,862,889	1.1
Expenditures at Warehouse Clubs and Super Stores	$161,845,503	$411,568,330	2.5
Expenditures at All Other General Merchandise Stores	$26,572,569	$18,590,279	0.7
Total General Merchandise Stores	$362,591,591	$627,021,497	1.7

Data Sources: Applied Geographic Solutions, Inc., Copyright 2009

Sub-Categories of Miscellaneous Store Retailers
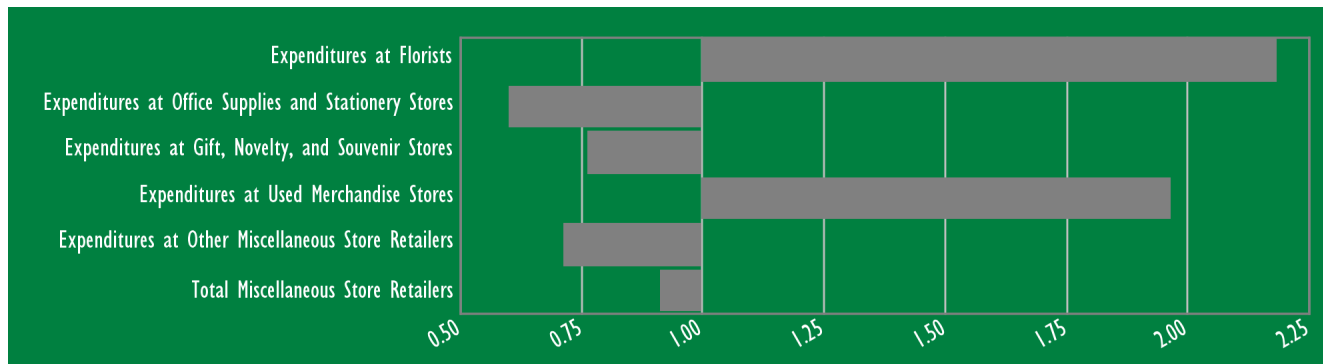
Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	$5,487,598	$11,990,937	2.2
Expenditures at Office Supplies and Stationery Stores	$16,858,053	$10,128,531	0.6
Expenditures at Gift, Novelty, and Souvenir Stores	$12,738,323	$9,738,993	0.8
Expenditures at Used Merchandise Stores	$6,431,078	$12,656,892	2.0
Expenditures at Other Miscellaneous Store Retailers	$33,326,528	$23,831,277	0.7
Total Miscellaneous Store Retailers	$74,841,579	$68,346,631	0.9

Sub-Categories of Foodservice & Drinking Places
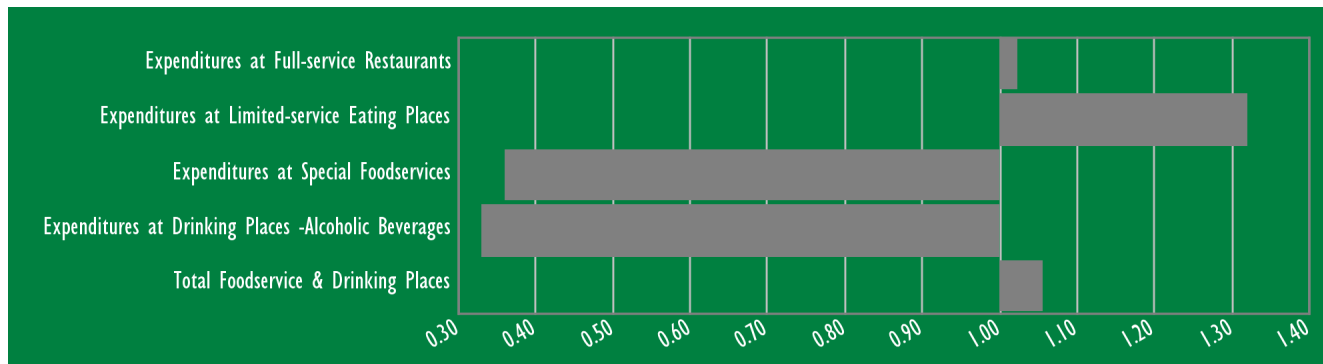
Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	$139,254,724	$142,633,277	1.0
Expenditures at Limited-service Eating Places	$124,453,763	$164,329,837	1.3
Expenditures at Special Foodservices	$25,443,968	$9,190,861	0.4
Expenditures at Drinking Places -Alcoholic Beverages	$13,932,650	$4,601,385	0.3
Total Foodservice & Drinking Places	$303,085,106	$320,755,360	1.1

Sources and Methodology

The primary data sources used in the construction of the database include:

• Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
• Census of Retail Trade, Merchandise Line Sales
• Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

The AGS (Applied Geographic Solutions) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the AGS Consumer Expenditure database.

These two components were then combined in order to derive estimated potential by store type. The results were then compared to current retail trade statistics to ensure consistency and completeness.

Buxton
IDentifying Customers

Population Profile	15 Min Drive Time
2013 Projection	188,391
2008 Estimate	187,097
2000 Census	184,459
1990 Census	147,872
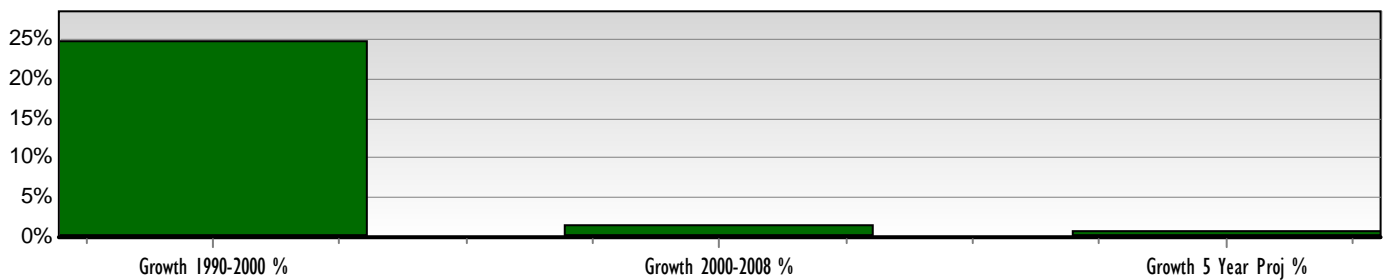
Population Change

Work Place Population	15 Min Drive Time
Total	83,411

Household Profile	
2013 Projection	79,476
2008 Estimate	76,088
2000 Census	70,164
1990 Census	55,335

Household Change

Buxton
IDentifying Customers
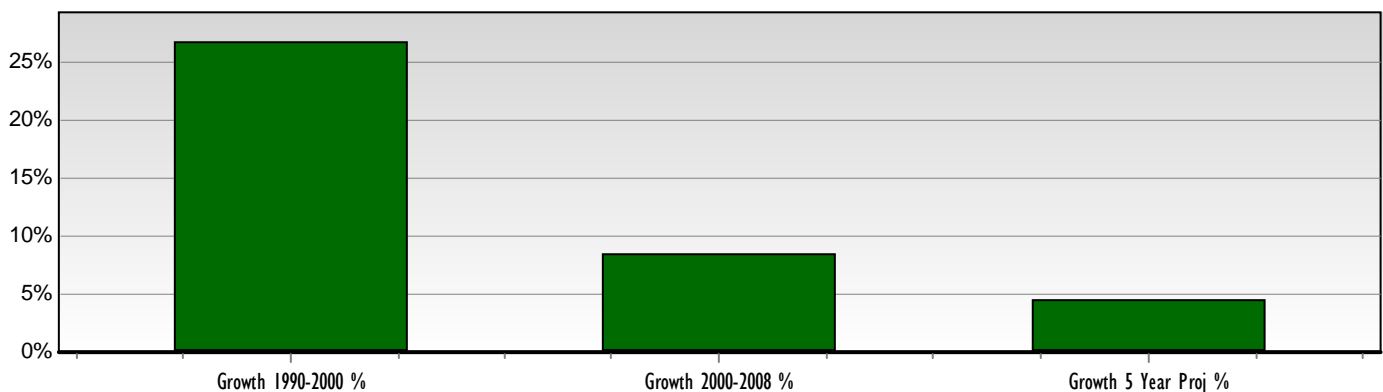
Analysis Geography: Warwick Blvd & Denbigh Blvd

Newport News, VA

Date: 5/11/2010

Population By Race (Current)

15 Min Drive Time

White	117,076
Black	52,744
American Indian	605
Asian	6,438
Pacific Islander	388
Other	3,677
Two Or More	6,169
Total Population By Race	**187,097**

Population By Race (Current)
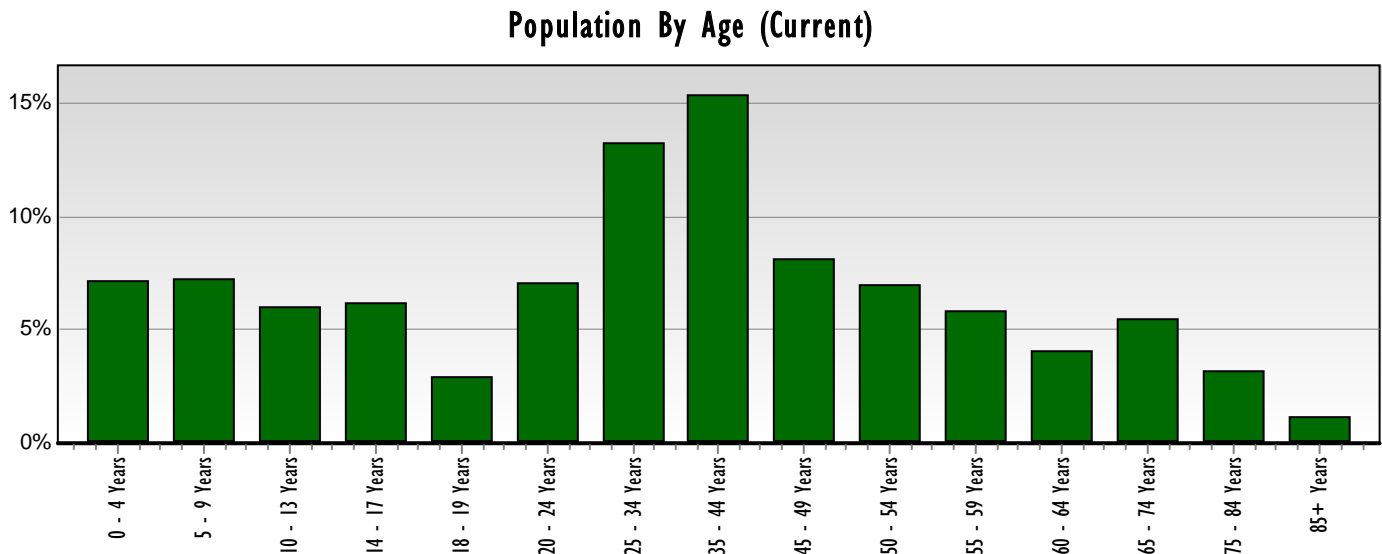

Population By Hispanic Origin (Current)

15 Min Drive Time

Hispanic Origin	8,925
Non Hispanic Origin	178,172

Population By Age (Current)

	15 Min Drive Time
0 to 4 years	13,430
5 to 9 years	13,566
10 to 13 years	11,252
14 to 17 years	11,633
18 to 19 years	5,423
20 to 24 years	13,147
25 to 34 years	24,754
35 to 44 years	28,750
45 to 49 years	15,153
50 to 54 years	13,093
55 to 59 years	10,879
60 to 64 years	7,652
65 to 74 years	10,236
75 to 84 years	5,982
85+ Years	2,154
Total Population By Age	**187,097**
Median Age	35.7

Population By Age (Current)

Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data. Data Source: Applied Geographic Solutions

Page: 3

Buxton®
IDentifying Customers

Households By Income (Current)

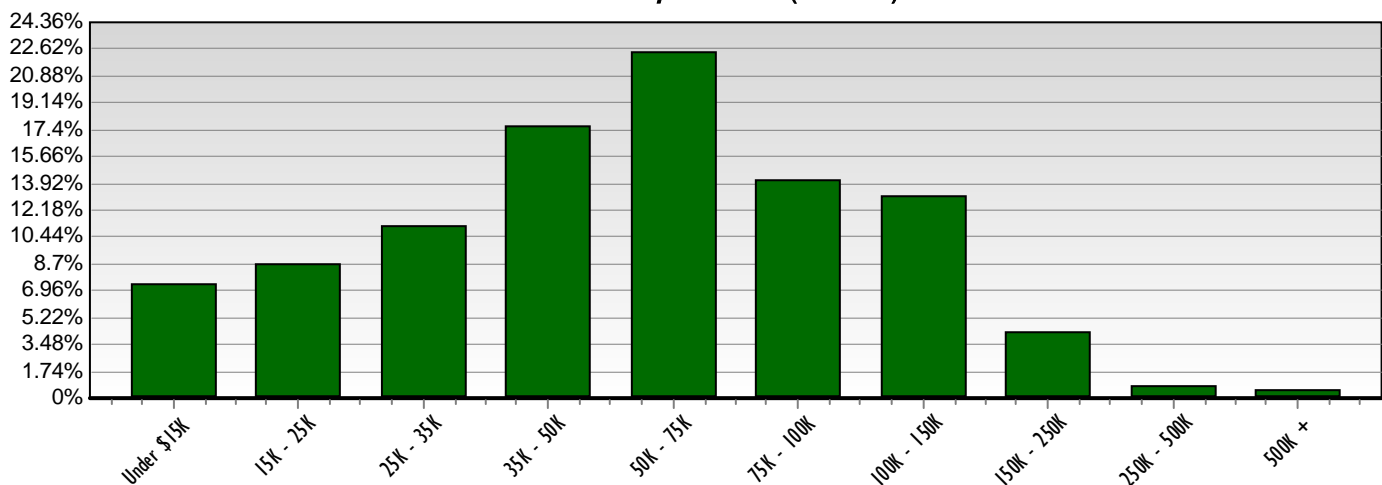|	15 Min Drive Time
Under $15,000	5,628
$15,000 to $24,999	6,636
$25,000 to $34,999	8,454
$35,000 to $49,999	13,451
$50,000 to $74,999	17,054
$75,000 to $99,999	10,710
$100,000 to $149,999	9,921
$150,000 to $249,999	3,300
$250,000 to $499,999	587
$500,000 +	347
Total Households By Income	**76,088**
Average Household Income	$67,192
Median Household Income	$58,869

Households By Income (Current)

Group Structure

Segment Group		Label	Segment Name	% of US Households
A	**Affluent Suburbia** **11.19%**	A01	America's Wealthiest	1.14%
		A02	Dream Weavers	1.74%
		A03	White-collar Suburbia	1.43%
		A04	Upscale Suburbanites	0.84%
		A05	Enterprising Couples	0.84%
		A06	Small-town Success	2.38%
		A07	New Suburbia Families	2.82%
B	**Upscale America** **13.26%**	B01	Status-conscious Consumers	1.55%
		B02	Affluent Urban Professionals	1.44%
		B03	Urban Commuter Families	6.33%
		B04	Solid Suburban Life	0.63%
		B05	Second-generation Success	2.40%
		B06	Successful Suburbia	0.91%
C	**Small-town Contentment** **7.64%**	C01	Second City Homebodies	0.74%
		C02	Prime Middle America	3.52%
		C03	Suburban Optimists	0.61%
		C04	Family Convenience	1.93%
		C05	Mid-market Enterprise	0.84%
D	**Blue-collar Backbone** **6.57%**	D01	Nuevo Hispanic Families	2.73%
		D02	Working Rural Communities	1.06%
		D03	Lower-income Essentials	0.83%
		D04	Small-city Endeavors	1.95%
E	**American Diversity** **9.73%**	E01	Ethnic Urban Mix	1.89%
		E02	Urban Blues	1.74%
		E03	Professional Urbanites	2.09%
		E04	Suburban Advantage	1.15%
		E05	American Great Outdoors	1.37%
		E06	Mature America	1.48%
F	**Metro Fringe** **10.63%**	F01	Steadfast Conservatives	6.51%
		F02	Moderate Conventionalists	1.60%
		F03	Southern Blues	0.92%
		F04	Urban Grit	0.55%
		F05	Grass-roots Living	1.05%
G	**Remote America** **7.39%**	G01	Hardy Rural Families	2.70%
		G02	Rural Southern Living	2.71%
		G03	Coal and Crops	1.81%
		G04	Native Americana	0.18%
H	**Aspiring Contemporaries** **11.18%**	H01	Young Cosmopolitans	3.22%
		H02	Minority Metro Communities	2.20%
		H03	Stable Careers	4.29%
		H04	Aspiring Hispania	1.48%
I	**Rural Villages and Farms** **4.77%**	I01	Industrious Country Living	1.30%
		I02	America's Farmlands	1.04%
		I03	Comfy Country Living	0.73%
		I04	Small-town Connections	0.48%
		I05	Hinterland Families	1.23%
J	**Struggling Societies** **8.20%**	J01	Rugged Rural Style	1.62%
		J02	Latino Nuevo	2.91%
		J03	Struggling City Centers	1.72%
		J04	College Town Communities	0.98%
		J05	Metro Beginnings	0.98%
K	**Urban Essence** **8.63%**	K01	Unattached Multi-cultures	0.38%
		K02	Academic Influences	0.47%
		K03	African-American Neighborhoods	1.93%
		K04	Urban Diversity	2.44%
		K05	New Generation Activists	2.37%
		K06	Getting By	1.05%
L	**Varying Lifestyles** **0.80%**	L01	Military Family Life	0.31%
		L02	Major University Towns	0.27%
		L03	Gray Perspectives	0.22%

Mosaic USA Group Descriptions

A full Mosaic media guide is available online at: www.buxtonco.com/mosaic.asp

Group **A: Affluent Suburbia**

The wealthiest households in the U.S. living in exclusive suburban neighborhoods enjoying the best of everything that life has to offer

The seven Segments in the Affluent Suburbia group comprise the wealthiest households in the nation. These segments outrank all other Mosaic Segments in terms of household income, home value and educational achievement. Concentrated in exclusive suburban neighborhoods, these households are predominantly white, college educated and filled with Baby Boom parents and their children. With their managerial and executive positions paying six-figure-plus incomes, they enjoy the good life in fashionable houses outfitted with the latest technology. These are the Americans who drive luxury cars, belong to country clubs, travel abroad and relax by sailing, golfing or skiing. Many are culture buffs who attend the theater, art shows, dance performances and concerts, all at high rates. Both their purchasing behavior and media choices reflect their interests in money management, travel, computers and gourmet foods.

Group **B: Upscale America**

College-educated couples and families living in the metropolitan sprawl earning upscale incomes providing them with large homes and very comfortable and active lifestyles

The six Segments in Upscale America are populated with mainly white, college-educated couples and families living in the metropolitan sprawl. Most of the adults work as executives and white-collar professionals, and their upscale incomes provide them with large homes and comfortable lifestyles. They like to spend their leisure time getting exercise—jogging, biking and swimming are popular—or shopping for the latest in-fashion and high-tech electronics. They are active in community affairs as members of business clubs, environmental groups and arts associations. They're selective media fans who prefer magazines and cable TV channels that cover business, fashion and the arts. Their one exception is the Internet. These Americans are omnivorous Web users who go online for everything from banking and trading stocks to downloading music and buying merchandise.

Group **C: Small-town Contentment**

Middle-aged, upper-middle-class families living in small towns and satellite cities with moderate educations employed in white-collar, blue-collar and service professions

The five Segments in Small-town Contentment represent the nation's middle-aged, upper-middle-class families living in small towns and satellite cities. As a group, they share moderate educations and a mix of well-paying jobs in white-collar, blue-collar and service professions. With their locations outside the nation's major metros, these households can afford recently built homes and new SUVs and pickup trucks. They enjoy outdoor sports like hiking, fishing and camping. They are also close enough to big cities to frequent comedy clubs, nightclubs and upscale malls for designer clothes and sporting goods. They tend to have varied media tastes, enjoying music and comedy shows on television, modern rock and country music on the radio and fitness and music magazines from newsstands. They are active Internet users going online for instant messaging, exchanging email and getting the latest sports scores and news.

Group **D: Blue-collar Backbone**

Budget-conscious, young and old blue-collar households living in older towns working in manufacturing, construction and retail trades

The four Segments in Blue-collar Backbone are a bastion of blue-collar diversity. This group features above-average proportions of both old and young residents, whites and Hispanics, families and singles, homeowners and apartment renters. Most residents live in older outlying towns and cities, and work at blue-collar jobs in manufacturing, construction and retail trades. Their lifestyle reflects a working-class sensibility. Their most popular leisure activities include baseball, soccer, fishing and woodworking. They're more likely to go out to a veterans club than attend a concert or play. These budget-conscious households shop at discount clothiers and department stores, and they have low rates for buying investments or insurance products. With relatively few entertainment options due to their remote location or lack of discretionary income, this group is a strong market for traditional media. Residents like to watch soaps and game shows on television, listen to country music on the radio and read a variety of outdoor and women's magazines.

Group **E: American Diversity**

A diverse group of ethnically mixed singles and couples, middle-aged and retired with middleclass incomes from blue-collar and service industry jobs

American Diversity is a reflection of how contrasting mid-America's population is. It is an ethnic mix of middleaged couples, singles and retirees. With a few exceptions, these six Mosaic Segments consist of households with average educations and middle-class incomes from blue-collar and service industry jobs. Many of the group's adults are older Americans—aging singles and couples who've already exited the workplace. They tend to have unassuming lifestyles, scoring high for reading books and newspapers, going to movies and plays, and socializing through fraternal orders and veterans clubs. They have traditional media tastes, enjoying TV news, movies and game shows as well as business and shelter magazines. Conservative in their politics and fashion, they have limited interest in new clothing styles, consumer electronics or the Internet.

Group **F: Metro Fringe**

Racially mixed, lower-middle-class clusters in older single-family homes, semi-detached houses and low-rise apartments in satellite cities

Metro Fringe is a collection of five racially mixed, lower-middle-class Mosaic Segments located primarily in satellite cities such as Kissimmee, FL, Flint MI, Joiliet, IL and Fresno, CA. Many of the group's households consist of young singles and couples who work at blue-collar and service industry jobs. They tend to live in older singlefamily homes, semidetached houses and low-rise apartments. Overall, this group is relatively active and pursues sports-oriented lifestyles participating in activities such as soccer and softball, rollerblading, skateboarding, gocarting and video gaming. As shoppers, they patronize discount retailers where they buy the latest fashion and tech gear at low prices. In their homes, they're fans of electronic media, whether it's watching youth-oriented cable channels like Spike TV, FX and Cartoon Network, or going online to chat forums and Web sites for job listings or music downloading.

Group **G: Remote America**

A mix of farming and small industrial rural communities with outdoor oriented lifestyles living primarily in America's heartland

The four Remote America Segments reflect heartland lifestyles, a mix of farming and small industrial communities mostly located in the nation's midsection. The working-class couples and families in this group tend to be employed in agriculture and blue-collar jobs that pay modest wages. The median home value is about half the national average, and a significant number of residents live in mobile homes. No group has a lower population density, and few have higher rates for outdoors-oriented lifestyles. Households spend their leisure time fishing, hunting, hiking and horseback riding. In their homes, they look to their TV sets for entertainment, especially game shows, soap operas and home improvement shows. Their magazine tastes may split along gender lines with the men reading hunting publications while the women peruse shelter magazines. On the radio, country and western is the preferred choice of music.

Group **H: Aspiring Contemporaries**

Young, mostly single, ethnically diverse, online active households living in new homes or apartments with discretionary income to spend on themselves

The four Segments in Aspiring Contemporaries are all filled with upward strivers. The households tend to be young (Generation Xers between 18 and 34 years old), ethnically diverse (about 40 percent are minorities) and unattached (about two-thirds are single or divorced). Yet despite traditional barriers to affluence, the members of these metropolitan segments are already solidly middle-class. Many live in relatively new homes or apartments valued at more than the national average—a reliable sign of upward mobility. They're big culture buffs who like to see plays, movies, comics and live bands. They spend a lot of their discretionary income on the latest fashions and consumer electronics. They're heavy media consumers, listening to jazz on the radio and reading the Sunday paper for science and technology news. Raised on technology, they are very Internet savvy, spending their leisure time online to chat, shop, job search, send instant messages, bid in auctions and frequent dating Web sites.

Group **I: Rural Villages and Farms**

Rural, middle-class married families and couples of varied ages, living and working in agricultural and mining communities

Representing America's agricultural and mining communities, Rural Villages and Farms is a collection of five low-density Segments filled with middle-class families and couples of varied ages. Most of the households in this group are married, white and high school educated. They maintain tranquil lifestyles in unpretentious houses and comfortable mobile homes. They share a fondness for outdoor sports, enjoying fishing, hunting, camping and motor sports. Many residents are do-it-yourselfers who are into woodworking and needlework. They like to shop at the big-box home improvement chains and watch how-to shows on TV. When it comes to media, nothing dominates like country music. They watch their favorite country and western stars on TV, listen to them on the radio and attend their concerts.

Group **J: Struggling Societies**

Young minorities, students and single parents trying to raise families on low-level jobs in manufacturing, health care and food services

The five Segments in Struggling Societies symbolize the challenges facing a significant number of economically challenged Americans. These households tend to be disadvantaged and uneducated. With incomes half the national average and nearly a third never completing high school, they are consigned to low-level jobs in manufacturing, health care and food services. Many of these residents are young, minorities, students and single parents trying to raise families on low incomes and tight budgets. Without much discretionary income their activities are limited and leisure pursuits include playing sports like basketball, volleyball and skateboarding. They shop at discount clothiers and sporting goods stores for casual apparel and athletic shoes. In these lessfortunate communities, television is a main source of entertainment, specifically reality programs, sitcoms, talk shows and sports. This group also relates to ethnic-oriented media, creating a strong radio market for stations that play Spanish, Mexican and urban contemporary music.

Group **K: Urban Essence**

Young, single and single-parent minorities living in older apartments working at entry-level jobs in service industries

As a whole, the six segments in Urban Essence make up the nation's least affluent group, a collection of relatively young minorities living in older apartments. More than half the households consist of African Americans and Hispanics. Many of these residents are single or single parents working at entry-level jobs in service industries. With their low education levels and household incomes, residents lead unpretentious lifestyles. Many spend their leisure time playing sports like baseball, basketball and football. With their above-average household size, they make a strong market for children's toys and electronic gear, especially video games, dolls and board games. They have high rates for enjoying traditional media, reading ethnic-targeted magazines, listening to jazz and urban contemporary radio and, especially, watching television. It's hard to find a network program or cable channel that they don't view watching comedies, cartoons, sports, soaps and game shows.

Group **L: Varying Lifestyles**

Residents who primarily live in group quarters including students, military personnel and institution populations

The three Segments that make up Varying Lifestyles are an unconventional group. What they share is the singular experience of living in group quarters. A majority of this group lives the unique lifestyles offered by the military and university dorm life. Though their daily lives are different from many Americans—as well as each other—those who have the ability are more likely than average Americans to visit museums, zoos and state fairs. They like to stay active doing aerobic exercise, hiking, bowling and playing sports like tennis, baseball and volleyball. They're frequent travelers who vacation abroad as well as within the United States. At home, they divide their time between the television and computer screens. They typically watch TV news, comedy programs and latenight talk shows. When online they frequent chat rooms, auction and banking sites and listen to Internet radio with a preference for rock 'n' roll.

Mosaic USA Segment Descriptions

Group A: Affluent Suburbia

Segment A01: America's Wealthiest

The nation's most wealthy households are financially secure with expensive tastes, living the most luxurious of lifestyles in the most affluent and exclusive communities

Segment A02: Dream Weavers

Well-off families with school age children, living an affluent, suburban version of the American Dream

Segment A03: White-collar Suburbia

A haven for upscale, college educated Baby Boomers living in suburban comfort in expensive new subdivisions

Segment A04: Upscale Suburbanites

A portrait of pleasant living, consisting of affluent, middle-aged empty nesting couples and singles in established suburban neighbourhoods

Segment A05: Enterprising Couples

A collection of married couples with children and childless duos living in upper-middle-class commuter communities

Segment A06: Small-town Success

White-collar, college educated, middle-aged working couples living in newly developed subdivisions outside the nation's beltways

Segment A07: New Suburbia Families

Young, affluent working couples with pre-school children concentrated in fast-growing, metro fringe communities

Group B: Upscale America

Segment B01: Status-conscious Consumers

Middle-aged Baby Boomer households living in suburban neighborhoods within a manageable commute to well-paying city jobs

Segment B02: Affluent Urban Professionals

Affluent singles and couples who live in the chic high-rise neighborhoods of many big cities, owning swank condos and apartments

Segment B03: Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

Segment B04: Solid Suburban Life

A mix of upper-middle class younger and middle-aged couples and singles who enjoy upscale comfort in maturing bedroom suburbs

Segment B05: Second-generation Success

Upper-middle-class and large multi-ethnic households working in white and blue-collar jobs within metro fringe communities

Segment B06: Successful Suburbia

Middle-age, married couples with children who enjoy an upscale life far from the downtown hustle of city living

Group C: Small-town Contentment

Segment C01: Second City Homebodies

Financially conservative, dual working, middle-aged couples and families living in small, satellite cities along the East and West coasts

Segment C02: Prime Middle America

A mix of young, upper-middle-class couples and families living in both small towns and midsized cities working in well paying white-collar and blue-collar jobs

Segment C03: Suburban Optimists

A portrait of middle-class diversity containing middle-aged couples and families living in older suburban homes, duplexes and apartments located in coastal states

Segment C04: Family Convenience

Sprawling families living in remote towns and military bases containing dual-income couples working at skilled blue-collar jobs in manufacturing and construction as well as in the military

Segment C05: Mid-market Enterprise

Located in small towns throughout New England, these households are mix of middle-aged and middle-income singles and couples with high school degrees and some college education

Group D: Blue-collar Backbone

Segment D01: Nuevo Hispanic Families

Young and lower income Latino family households living, in working-class neighborhoods of large cities

Segment D02: Working Rural Communities

Middle-class empty-nesting couples, middle-aged families and single seniors living in older, industrial towns skilled in blue-collar construction and manufacturing jobs

Segment D03: Lower-income essentials

Lower-income empty-nesting couples and aging seniors, living in out of the way towns in aging houses and mobile homes

Segment D04: Small-city Endeavors

A mix of lower income, young and old, singles, families and single parents living in older homes and small apartments in working-class towns

Group E: American Diversity

▇ Segment E01: Ethnic Urban Mix

An ethnic mix of young and diverse city dwellers who are middle-aged singles and families living in older inner-city neighbourhoods

▇ Segment E02: Urban Blues

Young Hispanic families, singles, and single parents living in urban areas working in low paying, entry-level blue-collar and service jobs

▇ Segment E03: Professional Urbanites

An upper-middle-class retirement oasis in the metropolitan sprawl containing very active empty nesting couples and older singles

▇ Segment E04: Suburban Advantage

Empty-nesting couples and retirees living in middle-class homes and condominium developments in dense retirement communities along the Atlantic and Pacific coasts

▇ Segment E05: American Great Outdoors

Older rural couples and retirees scattered in remote communities around the country living on low wage and Social Security in modest homes, small apartment buildings and mobile homes

▇ Segment E06: Mature America

Home to the Greatest Generation, these senior residents earn modest and fixed incomes and live primarily in city neighborhoods in high-rise apartments, mobile homes and assisted living facilities

Group F: Metro Fringe

■ Segment F01: Steadfast Conservatives

Home to high-school educated mature singles and couples living in middle-class urban bluecollar neighborhoods

■ Segment F02: Moderate Conventionalists

Highly mobile, middle-class singles and childless couples living in modest homes, semidetached houses and apartments scattered throughout second-tier cities

■ Segment F03: Southern Blues

Racially mixed, young and lower-middle-class singles and couples living in older, garden style apartments in satellite cities throughout the South

■ Segment F04: Urban Grit

Young, ethnically mixed, working-class singles and single-parent households living in blue-collar neighborhoods in second-tier cities scattered around the country

■ Segment F05: Grass-roots Living

Less educated, racially diverse mix of middle-aged couples, families and singles living in lowermiddle- class rural villages and aging industrial towns throughout the Midwest and South

Group G: Remote America

■ Segment G01: Hardy Rural Families

Predominantly middle-class, older Americans living rustic lifestyles in older single-family houses and mobile homes located in tiny towns and isolated villages

■ Segment G02: Rural Southern Living

Low income, blue-collar couples and families scattered in sparsely settled mobile home communities across the South

■ Segment G03: Coal and Crops

Rural, low-income families and singles living in small, racially mixed hamlets in sparsely populated areas working in mining and farming jobs throughout the Midwest and South

■ Segment G04: Native Americana

Young low-income, blue-collar families living in small towns and isolated communities in the Western states

Group H: Aspiring Contemporaries

Segment H01: Young Cosmopolitans

Residents are young, single, college educated and earning upper-middle-class incomes as whitecollar professionals, managers and executives living in luxury apartments and condos in fast growing cities

Segment H02: Minority Metro Communities

Concentrated in inner-ring suburbs, these married couples and single-parent minorities earn above-average incomes from a mix of service industry and white-collar jobs in transportation, health care, education and public administration

Segment H03: Stable Careers

Young and ethnically diverse singles residing in low- and high-rise apartment buildings and living comfortable lifestyles in big-city metropolitan areas

Segment H04: Aspiring Hispania

Young, married and single Hispanic households earning lower-middle-class incomes and living in urban gateway communities

Group I: Rural Villages and Farms

◼ Segment I01: Industrious Country Living

High school educated, upper-middle-class hard-working couples and families found in industrial remote towns and villages across the country

◼ Segment I02: America's Farmlands

Remote farming communities scattered across the nation earning middle-class incomes living in older, single-family homes on large plots of land

◼ Segment I03: Comfy Country Living

Older, empty-nesting college-educated couples and retirees reside in quiet small-town communities

◼ Segment I04: Small-town Connections

Relatively young high-school educated couples and single households living in older houses and mobile homes earning lower-middle-class incomes

◼ Segment I05: Hinterland Families

Blue-collar, middle-aged families and couples settled in isolated towns and villages throughout the South

Group J: Struggling Societies

■ Segment J01: Rugged Rural Style

Rural working-class households of older married couples and retirees residing in aging houses and mobile homes located in the most isolated communities in the Southwest and Western states

■ Segment J02: Latino Nuevo

Primarily young, un-educated, but large-family Hispanic households concentrated in the barrios of border states like Texas and California earning very low incomes as laborers and service workers

■ Segment J03: Struggling City Centers

Young, single and single-parent minority renters living in very low-income city neighborhoods throughout the South

■ Segment J04: College Town Communities

Young, single and college educated households and students living in and around college oriented communities

■ Segment J05: Metro Beginnings

Very low income, less educated singles and single-parent Hispanic and minority households living in high-rise apartments in diverse inner-city neighborhoods

Group K: Urban Essence

Segment K01: Unattached Multi-cultures

Highly mobile, multi-ethnic singles, single parents and unmarried couples living in low-income downtown urban neighbourhoods

Segment K02: Academic Influences

Multi-ethnic campus communities dominated by young college-educated families and students living in gentrifying neighbourhoods

Segment K03: African-American Neighborhoods

Young, working-class minority city dwellers and single-parent families with low educational levels living in older homes and low-rise apartments

Segment K04: Urban Diversity

Young and mobile multi-ethnic singles and single-parent families living in inter-city neighborhoods in a mix of rowhouses and high-rise apartment buildings

Segment K05: New Generation Activists

Less educated, young, low income minority singles and single-parent families concentrated in the nation's inner cities

Segment K06: Getting By

Very low income minority single and single-parent households located in dense neighborhoods of small cities

Group L: Varying Lifestyles

Segment L01: Military Family Life

Young American and ethnically-mixed couples and families who live in small towns on and around military bases and serving in the U.S. armed forces

Segment L02: Major University Towns

Dormitory living students and college educated households located in satellite cities that house sprawling universities

Segment L03: Gray Perspectives

Scattered in small towns across the country, these residents are a reflection of America's prison and institutionalized population, with some military barracks and households who support these facilities